Patient Representative V. 2.0 User Manual

July 1995

Introduction

A focus of the Patient Representative Program, which can be accomplished through this software package, is to ensure the medical center responds to patient needs. This package offers the opportunity to track and trend compliments and complaints and to measure a medical center's types of complaints as they relate to the Customer Service Standards, the Quality Matrix, and the National Patient Satisfaction Survey.

Overview

This software package was developed to support the Patient Representative with the collection and categorization of complaints and compliments. The issue codes provide the opportunity to track types of complaints and provide trends of specific complaints. Included within the issue codes are all the Customer Service Standards and the definitions of quality identified in the VHA definition of quality within the Quality Matrix. The software package provides the opportunity to measure the veteran's complaints and perceptions of a medical center related to those two areas. The clinical and administrative issues identified in the National Patient Surveys were included in the issue codes, which can provide a correlation between the "biased" complaint and the findings from the "unbiased" survey.

Functional Description

The Patient Representative software package is designed to support the following actions.

- Entering and editing contact information
- Building and editing local contact issue codes
- Sending Reports of Contact via the Alert System
- Tracking contacts that have responses due
- Printing various lists, statistical reports, and ad hoc reports

Orientation

The format of this manual is summarized in the Table of Contents. The Glossary defines general terms relevant to the software.

In this manual, user responses are in boldface type. The symbol **<RET>** is used to show that the return key (enter key on some keyboards) is pressed.

On-Line Documentation

On-line documentation is provided in the form of Help throughout the program. If at any time you become unsure of how to respond to a prompt, simply enter **?**, **??**, or **???** to obtain more information. Generally this package provides all on-line documentation for individual prompts by entering **?** or **??**.

To obtain brief descriptions of each option within a menu, enter **???** following the *Select....Menu Option* prompt. Description of the menu options can also be found at the beginning of the Package Operation section and throughout the instructional portion of this manual.

Issue Code Definitions

Whenever you are at the *Issue Code* prompt in either the Enter New Contact option or the Edit Contact Record option, you can enter a single "?" plus the issue code to obtain the definition for the issue code.

Division Prompt

When the division prompt appears in the Patient Representative Package software, it pertains to those sites that have been integrated through the National Database Integration (NDBI) project and share one database. It is not intended to be used for those sites which are considered multi-divisional due to settings such as domiciliaries or satellite clinics.

Alerts

Receiving Alerts

Alerts show up as soon as the user logs on. Whenever there are active Patient Representative alerts waiting for a recipient, they will appear in the following manner.

```
Reports Menu ...
Set-up and Maintenance Menu ...

You have PENDING ALERTS
          Enter  "VA   VIEW ALERTS      to review alerts

Select Patient Representative Manager Menu Option: VA  View Alerts

 1.   New Patient Representative report of contact entered (140.950021).
 2.   New Patient Representative report of contact entered (140.950020).
          Select from 1 to 2
          or enter ?, A, I, P, M, R, or ^ to exit: 1

Alert action:  (R/I/D/P): Print// <RET>

DEVICE: HOME// <RET>  HOME     RIGHT MARGIN: 80// <RET>
```

Printing Alerts

The recipient can print a hard copy of the Report of Contact (ROC) associated with the alert or bring it to the screen to view.

```
** This information is not for the Patient Record **

                        Report of Contact            Date: FEB 02, 1995

Contact Number:     140.950021              Date of Contact:  FEB 01, 1995
Patient Name:       ARBOGAST,JON            Patient SSN:      123443223
Treatment Status:  Inpatient                Location of Event:4 West
Name of Contact:   Mr. Arbogast             Phone of Co ntact:
Source of Contact: Ward Visit               Info taken by:    SERENE,SUE
Date Due:          FEB 3,1995
Refer To:          WILLIS,CATHY
                   HARVEY,JOHN


Issue Text:
   This patient felt very strongly that he has not been included in  any
   decisions concerning his treatment.  He states that only his wife has been
   consulted.
   He also states that he is diabetic and yet he receives dessert and fatty
   foods on his trays.
```

Responding to Alerts

If you time out while entering a response, the response is saved for 2 weeks for editing. If at the end of 2 weeks, you have not completed the response and saved it, the response is terminated. No response is laid into the RESOLUTION COMMENTS field unless it is saved by the person sending the response (note "Saving text..." below). Also once a response is saved, the sender cannot edit it again. It can be edited by the Patient Representative using the Edit Contact Record option.

```
Alert action:  (R/I/D/P): Ignore// Respond


================================================================================
M======T======T======T======T======T======T======T======T======T======T===T
(Press PF1 then H for help)[ INSERT  ][ WRAP ]<  >
This problem was managed...


Saving text ...

Saving your response, please wait . . . Done
```

Ignoring Alerts

After reading the ROC, you can enter ignore at the *Alert action* prompt. This will hold the alert until a later date when you may wish to enter a response.

```
 1.    New Patient Representative report of contact entered (140.950020).
        Select from 1 to 1
        or enter ?, A, I, P, M, R, or ^ to exit: 1

Alert action:  (R/I/D/P): Print// Ignore
```

Deleting Alerts
You may delete the alert if you have no need to respond, as in cases where a ROC is sent for information purposes only.

```
 1.   New Patient Representative report of contact entered (140.950020).
         Select from 1 to 1
         or enter ?, A, I, P, M, R, or ^ to exit: 1

Alert action:  (R/I/D/P): Print// Delete

         Reports Menu ...
         Set-up and Maintenance Menu ...

Select Patient Representative Manager Menu Option:
```

Information Only Alerts
Whenever you respond to an alert, an Information Only alert is sent back to the originator of the ROC. Notice the "I" following the number one, designating this alert as Information Only.

```
1.I  Patient Rep response by DOE,JOHN to 140.950020.
         Select from 1 to 1
         or enter ?, A, I, P, M, R, or ^ to exit: ??

YOU MAY ENTER:
   A number in the range 1 to 1 to select specific ale rt(s)
   for processing.
   A to process all of the pending alerts in the order shown.
   I to process all of the INFORMATION ONLY alerts, if any, without further
   ado.
   P to print a copy of the pending alerts on a printer
   M to receive a MailMan mes sage containing a copy of these pending alerts
   R to Redisplay the available alerts
   ^ to exit

      Select from 1 to 1
      or enter ?, A, I, P, M, R, or ^ to exit: I

Processed Alert Number 1
    Patient Rep response by DOE,JOHN to 140.950020.
```

Package Management

Patient Representative records produced by this software are not to be placed in the patient's medical or administrative record.

Documents produced by the Patient Representative are not considered to be confidential Quality Management documents under 38 U.S.C. 5705 and its implementing regulations. In general, the patient has a right to know what happened as a result of the complaint he brought to medical center staff or the Patient Representative.

Documents may be confidential under other legislation such as 38 U.S.C. 5701 which protects the identity of VA patients. Please consult the Release of Information Officer before releasing information to any non-VA individual, except the patient who made the complaint.

If a study or review following a patient complaint is likely to produce sensitive, confidential information, that study or review should be designated a Focused Review. This generates confidential documentation at the outset.

Package Operation

Overview

Enter New Contact
This option creates a new record in the CONSUMER CONTACT file (#745.1).

Edit Contact Record
This option allows you to edit an open consumer contact record.

Open/Close/Delete Contact Record
This option lets you open a consumer contact record that has been closed; close a record; or delete a record.

Contact Inquiry
This option displays the data for a single record or all records in a date range.

Responses Due
This option provides a list of contact records whose response due date is within a selected date range.

Send or Kill an Alert
This option can be used to send a new alert for a Report of Contact or to kill an alert.

Reports Menu

Ad Hoc Report
This option lets you design your own report by sorting and printing from the CONSUMER CONTACT file (#745.1) to your specifications.

Contacts with No Patient Identified
This option prints a list of contact records that do not have a patient name associated with the contact.

Daily List of Patient Contacts
This is a list of contacts by date.

List of Open Cases
This option provides a list of open cases for a selected date range.

Patient Name with Brief Data
This option provides a brief summary of a selected patient's contacts.

Report by Employee
This option prints contact data for any involved employee over a selected date range.

Report of Contact
This option allows you to print/display a Report of Contact to a printer or screen.

Statistical Reports Menu

Discipline Contact Totals
This option counts the number of contacts for each discipline over a selected date range.

Discipline Issue Totals
This option provides totals of all issues for each discipline over a selected date range.

Service/Discipline Contact Totals
This report totals contacts by service/discipline.

Service/Discipline Issue Totals
This option totals issue codes for each service/discipline.

Customer Service Standards Report
This option tallies the number of Reports of Contact logged with each Customer Service Standard.

Employee Contact Totals
This option counts the number of contacts for each employee over a selected date range.

Issue Totals for All, Male, or Female
This option prints issue totals for a selected date range, for either all records, records with male patients or records with female patients.

Location Issue Totals
This option prints the total of number of issues for a date range sorted by hospital location.

Old Service/Section Contact Totals

This option prints the total contacts for each service. The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997.

Old Service/Section Issue Totals

This option provides totals of all issues for each service for a date range. The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997.

Spreadsheet Report

This option prints various spreadsheet reports using a comma as a delimiter.

Set-up and Maintenance Menu

This menu contains the options used to manage key allocation, archive data, add congressional contacts, purge records, and edit site parameters. It contains the following options.

Add New Service/Discipline

This option allows the user to add new entries into the SERVICE/DISCIPLINE file (#745.55) or to edit existing entries.

Archive Report

This option prints brief data on each record within the selected date range. The data can be saved to a file, captured to a word processing package to save on a floppy, or sent to a printer for a hard copy.

Congressional Contact Enter/Edit

This option is used to enter congressional offices/names if the site wants to track contact data for specific congressional contacts.

Issue Code Enter/Edit

This functionality is no longer available.

Patient Representative Keys

This option is used to assign/unassign the security keys in the Patient Representative package.

Purge Contact Records

This option allows you to purge (delete) a range of records from the database.

Site Parameters Edit

This option is used to edit the site parameters associated with the Patient Representative package.

Enter New Contact

Introduction

The Enter a New Contact option is used to create a record for a contact. Since all package reports are based on data in the contact record, as much data as is available should be entered.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for the applicable division.

The following is an explanation of some of the prompts which may appear in this option.

TREATMENT STATUS - Appears only if a patient name is entered.

INFORMATION TAKEN BY - A list of choices for this prompt can be created through the Patient Representative Keys option by assigning the Patient Rep Info Taker Key to those individuals who should be authorized to take information.

CONTACT MADE BY - If CO (congressional) is entered at this prompt, the *Congressional Contact* prompt will also appear.

LOCATION OF EVENT - Choices are from the HOSPITAL LOCATION file (#44).

Select EMPLOYEE - Employee allegedly involved in the issue or the employee receiving the compliment.

Select REFER CONTACT TO - If you have turned on the *Automatic ROC Alert* site parameter, the entry in this field will receive an alert message containing the ROC.

RESOLUTION COMMENTS - If the resolution of the issue is known at this time, enter it here. If not, you may enter it at a later time through the Edit Contact Record option.

REFER TO SEAT - SEAT is an acronym for Self Empowered Action Team. This is a VISN-level review team.

Enter New Contact

Example

```
Enter Date of Contact: t   (NOV 24, 1998)
Enter Patient Name: ADAMS,SAMUEL   05-05-25   214569879   NO   SMITH,MARY F
MRA TEAM 1


               Enter New Patient Representative Contact

Patient Name:        ADAMS,SAMUEL        Patient SSN:        214569879
Patient DOB:         MAY 05, 1925        Patient Sex:        M
Eligibility Status: NSC                  Patient Category:  REQUIRED
Period of Service:  KOREAN               Persian Gulf War?: Not Entered

   Service Connected: NO
 Rated Disabilities: NONE STATED

There are no open Contacts on patient ADAMS,SAMUEL.
  Are you adding '100.980007' as a new CONSUMER CONTACT (the 7TH)? No// Y
  (Yes)

DIVISON:
   1   BUFFALO
   2   BATAVIA
Enter the number of your choice: 1   BUFFALO

TREATMENT STATUS: O   Outpatient
INFORMATION TAKEN BY: BAILEY,CARL
NAME OF CONTACT: ADAMS,S
TELEPHONE NO. OF CONTACT: 555 444-0909
CONTACT MADE BY: PA  Patient
Select SOURCE(S) OF CONTACT: P  (PHONE)
   SOURCE(S) OF CONTACT: PHONE// <RET>
Select SOURCE(S) OF CONTACT: <RET>
LOCATION OF EVENT: CARDIOLOGY CLINIC
Select EMPLOYEE: BEALL,RON
Select EMPLOYEE: <RET>
Select REFER CONTACT TO: BATES,JOHN
Select REFER CONTACT TO: <RET>
DATE SENT: T  (NOV 24, 1998)
DAYS RESPONSE EXPECTED BY: 3
```

Enter New Contact

Example

```
ISSUE TEXT:
  1>Mr. Adams would like to thank Mr. Beall for coming to his aid when he had
  2>difficulty getting his wheelchair over a curb during his last visit.  He
  3>stated that Mr. Beall went out of his way to then help him find the
  4>correct clinic and asked that someone help him back to his car after his
  5>appointment.  Voluntary Service provided the help that was needed.
  6><RET>
  7>Mr. Adams would also like to complain about the poor access from the south
  8>lot to the Outpatient area.  He feels that access for wheelchairs is
  9>inadequate particularly in the winter because  snow is not removed
  10>sufficiently to get around.
  11><RET>
EDIT Option: <RET>
RESOLUTION COMMENTS:
  1><RET>
Select ISSUE CODES: EN06    Issues related to safety
    Select SERVICE/DISCIPLINE: ENVIRONMENTAL MANAGEMENT   137    ENVIRONMENTAL
MANAGEMENT
    Select SERVICE/DISCIPLINE: <RET>
Select ISSUE CODES: <RET>
REFER TO SEAT: N  NO
LEVEL OF SATISFACTION: <RET>

ENTER DATE OF CONTACT: <RET>
```

Edit Contact Record

Introduction

This option allows you to edit any open contact record. If you need to edit a closed record, first open it using the Open/Close/Delete Contact Record option.

If the site parameter to display the issue codes is set to YES, you will see them displayed here.

You will be asked if you wish to refer this record to SEAT (Self Empowered Action Team). This is a VISN level review team. SEAT can have contacts referred to them, or a contact can originally be made at the VISN level.

Example
The example provided shows Mr. Bates was sent a Report of Contact (ROC) on this complaint. His response via the Alert System was laid into the RESOLUTION COMMENTS field with his name and the date.


```
Select CONTACT NUMBER: 0026    100.980007       11-24-98     ADAMS,SAMUEL


              Edit Patient Representative Contact

Contact Number:      100.980007           Date of Contact:  NOV 24, 1998
Patient Name:        ADAMS, SAMUEL        Patient SSN (c):  214569879
Patient DOB (c):     MAY 05, 1925         Patient sex (c):  MALE
Eligibility Status:  NON-SERVICE CONNECTED Patient Category: CATEGORY A
Period of Service:   KOREAN               Persian Gulf War?: Not Entered
Division:            BUFFALO

         SC Percent: NO
 Rated Disabilities: NONE STATED

DIVISION: BUFFALO// <RET>
TREATMENT STATUS: Outpatient// <RET>
INFORMATION TAKEN BY: BAILEY,CARL// <RET>
NAME OF CONTACT: ADAMS,S// <RET>
TELEPHONE NO. OF CONTACT: 555 444-0909// <RET>
CONTACT MADE BY: Patient// <RET>
Select SOURCE(S) OF CONTACT: PHONE// <RET>
LOCATION OF EVENT: CARDIOLOGY CLINIC// <RET>
Select EMPLOYEE: BEALL,RON// <RET>
Select REFER CONTACT TO: BATES,JOHN// <RET>
DATE SENT: NOV 24,1998// <RET>
DAYS RESPONSE EXPECTED BY: 3// 4
```

Edit Contact Record

Example

```
ISSUE TEXT:
 1>Mr. Adams would like to thank Mr. Beall for coming to his aid when he had
 2>difficulty getting his wheelchair over a curb during his last visit.  He
 3>stated that Mr. Beall went out of his way to then help him find the
 correct 4>clinic and asked that someone help him back to his car after his
 5>appointment.  Voluntary Service provided the help that was needed.
 6><RET>
 7>Mr. Adams would also like to complain about the poor access from the south
 8>lot to the Outpatient area.  He feels that access for wheelchairs is
 9>inadequate particularly in the winter because snow is not removed
 10>sufficiently to get around.
RESOLUTION COMMENTS:
***  11/28/98 8:51:03 am  BATES,JOHN  ***
I checked the area Mr. Adams mentioned and agree that the area is inadequate
for any wheelchair bound or other person who has difficulty getting around.  I
put flags up surrounding access areas that should be thoroughly cleaned during
snow clearance.  These will remain up all winter.  I also spoke with Voluntary
Service about the problem and they have offered to place a person in the area
during bad weather to aid any person needing help.  This  action is really only
short term.  We should consider removing curbs from this area altogether.
Thank you for bringing this to my attention.
***  End of response  ***
  Edit? NO// <RET>
Select ISSUE CODE: EN06// <RET>
  ISSUE CODES: EN06   Issues related to safety// <RET>
  Select SERVICE/DISCIPLINE: ENVIRONMENTAL MANAGEMENT// <RET>
    SERVICE/DISCIPLINE: ENVIRONMENTAL MANAGEMENT// <RET>
  Select SERVICE/DISCIPLINE: <RET>
Select ISSUE CODES: <RET>
REFER TO SEAT: NO// <RET>
LEVEL OF SATISFACTION: 5   Very satisfied
DATE RESOLVED: T    (NOV 29, 1998)
    DAYS TO RESOLUTION: 4
```

Open/Close/Delete Contact Record

Introduction

This option provides a quick mechanism to open a closed record, close an open record, or delete a record. Deleting a record purges it from the database.

At the *Contact Number* prompt, you may enter the last 4 numbers of the contact number, the date of the contact, or the patient name (if a patient is associated with the contact).

Example

```
Select CONTACT NUMBER: 1000.980008    11-27-98    BALSAVICH,T.


          This option will allow the user to open, close, or delete
             a Patient Representative Contact record

Contact Number:       100.980008            Date of Contact:  NOV 27, 1998
Patient Name:         BALSAVICH,T.          Patient SSN (c):  024247368
Patient DOB (c):      SEP 27, 1947          Patient sex (c):  MALE
Eligibility Status:  NSC                    Patient Category: REQUIRED

     Select one of the following:

          O         Open
          C         Closed
          D         Delete

STATUS: Open// c  Closed
```

Contact Inquiry

Introduction

This option is used to view the content of a single contact record or all records contained in a user-selected date range.

At the *Contact Number* prompt, you may enter the last 4 numbers of the contact number, the date of the contact, or the patient name (if a patient is associated with the contact).

Example

```
     Select one of the following:

        C     Contact Number
        D     Date Range

Select records by: C    Contact Number

Select CONTACT NUMBER: FARCAS,SCOTT     08-23-48    475632643      YES      NSC
VETERAN
        1     140.950005        01-12-95       FARCAS,SCOTT
        2     140.950012        01-24-95       FARCAS,SCOTT
        3     140.950014        01-29-95       FARCAS,SCOTT
        4     140.950026        02-06-95       FARCAS,SCOTT
CHOOSE 1-4: 4   140.950026

Another one: <RET>

DEVICE: HOME// <RET>    HOME     RIGHT MARGIN: 80// <RET>
```

Contact Inquiry

Example

```
CONSUMER CONTACT LIST                         FEB  8,1995  07:52    PAGE 1
-------------------------------------------------------------------------

CONTACT NUMBER: 140.950026              DATE OF CONTACT: FEB  6, 1995
  PATIENT NAME: FARCAS,SCOTT            ELIGIBILITY STATUS: NSC
  CATEGORY: CATEGORY A                   INFORMATION TAKEN BY: DONAT,DONALD
  ENTERED BY: WILLIS,CAROL              NAME OF CONTACT: Mr. Farcas
  TELEPHONE NO. OF CONTACT: (123)456-7890
  CONTACT MADE BY: Patient              LOCATION OF EVENT: CLINIC 201
  PERIOD OF SERVICE: VIETNAM            TREATMENT STATUS: Outpatient
  REFER TO SEAT: NO                     DATE SENT: FEB  6, 1995
  DAYS RESPONSE EXPECTED BY: 2
ISSUE CODES: CM01   Courtesy
ISSUE CODES: EN06   Issues related to safety
SERVICE/DISCIPLINE: ENVIRONMENTAL MANAGEMENT      DISCIPLINE:  EM
 ISSUE TEXT:   Mr. Farcas would like to thank Mr. Task for coming to his aid
 when he had difficulty getting his wheelchair over a curb during his last
 visit.  He stated that Mr. Task went out of his way to then help him find the
 correct clinic and asked that someone help him back to his car after his
 appointment.  Voluntary Service provided the help that was needed.

 Mr. Farcas would also like to complain about the poor access from the south
 lot to the Outpatient area.  He feels that access for wheelchairs is
 inadequate particularly in the winter because snow is not removed
 sufficiently to get around.
  STATUS: Open
EMPLOYEE: TASK,MICHAEL
REFER CONTACT TO: JONES,HARVEY
REFER CONTACT TO: WILLIAMSON,CATHY
SOURCE(S) OF CONTACT: Visit
SSN (c): 475632643                      DOB (c): AUG 23, 1948
SEX (c): MALE                           DATE DUE (c): FEB  8, 1995
```

Responses Due

Introduction

This option provides a list of contact records whose response due date is within a selected date range.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly, Quarterly, Semi-Annually, Yearly, Fiscal Yearly, User Selectable
Select date range: USER SELECTABLE

Enter beginning and ending dates for the desired time period:

Beginning Date: 7 7 99 (JUL 07, 1999)
Ending Date: JUL 7,1999// 7 12 99  (JUL 12, 1999)

Range Selected: JUL 7, 1999 to JUL 12, 1999

DEVICE: A100          Right Margin: 80// <RET>




Responses Due                              JUN  8,1999  08:31    PAGE 1
          Date Range Selected: JUL 07, 1999 to JUL 12, 1999
Contact #      Patient Name              SSN          Refer To
Issue Codes
-----------------------------------------------------------------------------


                       DATE DUE: JUL  7,1999

140.950002   CAM,FELIX                 666770000   CHANEY,LUCAS
CC15  Appt date/time misunderstood, not communicated, or in



                       DATE DUE: JUL 11,1999

140.950003   GORIN,HARRY               387581000   REESE,RH ONDA
T107  Delay/postponement in surgical procedure  (*Timeliness)
```

Send or Kill an Alert

Introduction

This option is used to send a ROC via the Alert System to one or more individuals. Note that the contents of the RESOLUTION COMMENTS field does not get sent with a ROC alert.

An alert remains active for the recipient unless the recipient kills (deletes) the alert, responds to the alert and saves it, you kill the alert, or IRM deletes the alert after it is 2 weeks old. Active means that whenever the recipient of the alert logs on s/he will receive the following:

```
     You have PENDING ALERTS
              Enter "VA   VIEW ALERTS    to review alerts
```

When "VA" is entered at a menu selection prompt, the recipient receives a list of all pending alerts including ones for ROCs. ROC alert messages look similar to the following. Newer alerts appear at the top of the list.

```
1.  New Patient Representative report of contact entered (140.950026)
2.  New Patient Representative report of contact entered (140.950 006)
```

You may send as many ROC alerts as you want to as many recipients as you want. If you send the same ROC alert to the same person, and the first alert is still active, that person will have two alerts with the same ROC.

If two recipients have active alerts for a single ROC and you use the kill an alert action, it will kill the alert only for the person or persons you select.

Example

```
Select CONTACT NUMBER: 1   140.950026         02-06-95      FARCAS,SCOTT
       OK? Yes// <RET>   (Yes)

Select REFER CONTACT TO: WILLIAMSON,CATHY

     Select one of the following:

          S         Send alert
          K         Kill alert

Alert action: S   Send alert

Select REFER CONTACT TO: <RET>

Select CONTACT NUMBER: <RET>
```

Reports Menu
Ad Hoc Report

Introduction

The Ad Hoc Report option provides the means to build your own reports on the Patient Representative contact data. For an in-depth review of how to use Ad Hoc, refer to the following manual.

DHCP National Training Program
Patient Representative, Version 1.0
June 1994
Designing Your Own Ad Hoc Reports.

The DIVISION field has been added to this report as a sort field. Only those sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for the applicable division.

This option provides the ability to update sort and print macros. If the Ad Hoc Report menu has changed since the macro was created, a message will be displayed once the macro is loaded, informing you the macro is not current. The macro can then be reviewed and if it still reflects the desired report, it can be updated. If the macro is no longer valid, you are given the opportunity to reenter the macro.

Here are the definitions of the macro functions and the sort and print modifiers.

Macro Functions

[L   Load sort (and print) macro.
Used to bring up the macro in order to print your report.

[S   Save sort (and print) macro.
You cannot build a macro that sorts and prints. Sort and print macros are created separately.

[O   Output macro
The output macro will print a blank Ad Hoc Macro Report or one with the fields and modifiers you have entered. This does not save the entries. There are two ways to obtain a record of both sort and print fields and modifiers. Enter **[O** at the beginning of the sort and also at the beginning of the print. Enter the **[O** only at the beginning of the print selections.

[I   Inquire sort (and print) macro
This function will let you look at the sort fields or print fields for the chosen macro.

Introduction

[D Delete sort (and print) macro
This function deletes any macros you want to eliminate.

Sort Modifiers

These are the modifiers used in front of the sort fields. Each performs a specific task on that field.

> PREFIXES
> #   New page for each new value of the specified field.
> -   Sort field values in reverse order. (numeric & date/time fields only)
> +   Print subtotals for specified field totals.
> **!**   Give sequential number to each new value within specified field.
> @   Suppress sub-headers for specified field.
> '   Do not sort by specified field (select a range for this field, then sort by some other field).

These are the modifiers used in back of the sort fields.

> SUFFIXES
> **;Cn**   Start the sub-header caption at column 'n'.
> **;Ln**   Sort by the first 'n' characters of the value of the sort field.
> **;Sn**   Skip 'n' lines every time the value of the sort field changes.
>   You may use ;S to skip a single line (equivalent to ;S1).
> **;"xxx"**   Use 'xxx' as the sub-header caption. You may use ;"" if no sub-header caption is desired.

Print Modifiers

These are the modifiers used in front of the print fields.

> PREFIXES
> **&**   Print totals for this field.
> **!**   Print count for this field.
> +   Print totals, counts, and mean for this field.
> #   Print totals, count, mean, maximum, minimum, and standard deviation for this field.

Reports Menu
Ad Hoc Report

Introduction

These are the modifiers used in back of the print fields.

     SUFFIXES

;Cn	Start the output for the selected field in column 'n'.
;Dn	Rounds numeric fields to 'n' decimal places.
;Ln	Left justify data in a field of 'n' characters. If the data is more than 'n' characters in length, it will be truncated to fit.
;N	Do not print duplicated data for a field.
;Rn	Right justify data in a field of 'n' characters. If the data is more than 'n' characters in length, it will NOT be truncated to fit.
;Sn	Skip 'n' lines before printing the data for the selected field. You may use ;S to skip a single line (equivalent to ;S1).
;T	Use the field title as the header.
;Wn	Wrap the output of the selected field in a field of 'n' characters. Breaks will occur at word divisions. Use ;W for default wrapping.
;X	Omit the spaces between print fields and suppress the column header.
;Yn	Start the output for the selected field at horizontal line (row) number 'n'.
;"xxx"	Use 'xxx' as the column header.
;""	Suppresses column header.

Example

Enter "[S" to save the macro at the first sort selection.

```
=========== Patient Representative Ad Hoc Report Generator ===========

      Contact Number              21    Date Sent
 2    Date Of Contact             22    Date Due
 3    Patient Name                23    Issue Codes
 4    SSN                         24    Serv/Sect Involved (to 10/1/97)
 5    Date of Birth               25    Serv/Discipline Involved
 6    Sex                         26    Disciplines
 7    Eligibility Status                Issue Text
 8    Category                    28    QM Involvement
 9    Info Taken by                     Resolution Comments
10    Entered by                  30    Date Resolved
      Name of Contact             31    Status
      Phone of Contact            32    Code Status
13    Contact Made by                   Code Definition
14    Source of Contact (to 10/1/97)  34    Refer to SEAT
15    Source(s) of Contact        35    Division
16    Location of Event           36    Level of Satisfactio n
17    Treatment Status            37    Persian Gulf Service?
18    Employee                    38    Period of Service
19    Refer Contact to                  Issue Code Name
20    Congressional Contact

   Sort selection # 1: [Save sort macro

   The macro will be saved when you exit the sort menu.
```

Example

```
========== Patient Representative Ad Hoc Report Generator ==========

      Contact Number                21    Date Sent
 2    Date Of Contact               22    Date Due
 3    Patient Name                  23    Issue Codes
 4    SSN                           24    Serv/Sect Involved (to 10/1/97)
 5    Date of Birth                 25    Serv/Discipline Involved
 6    Sex                           26    Disciplines
 7    Eligibility Status                  Issue Text
 8    Category                      28    QM Involvement
 9    Info Taken by                       Resolution Comments
10    Entered by                     30   Date Resolved
      Name of Contact               31    Status
      Phone of Contact              32    Code Status
13    Contact Made by                     Code Definition
14    Source of Contact (to 10/1/97) 34   Refer to SEAT
15    Source(s) of Contact          35    Division
16    Location of Event             36    Level of Satisfaction
17    Treatment Status              37    Persian Gulf Service?
18    Employee                      38    Period of Service
19    Refer Contact to                    Issue Code Name
20    Congressional Contact


    Sort selection # 1:  ??

Select the major data element to sort by.  Maximum of 4 sort fields allowed.
Enter numeric 1 to 39, <RETURN> to end, ^ to exit.

Macro functions:           [L  Load sort macro       [S  Save sort macro
   [O  Output macro        [I  Inquire sort macro     [D  Delete sort macro

Sort prefixes:   (e.g. enter +1 to turn on totaling for field 1)
    +  Totalled fields      -  Reverse sort order      !  Sequence/ranking number
    #  New page on sort     @  Suppress sub-header     '  Range without sorting

Sort suffixes:   (e.g. enter 1;C5 to print the field 1 sub-header at column 5)
    ;Cn  -  Start the sub-header         ;Ln    -  Use the first n characters of
            caption at column n                    a field value for sorting
    ;Sn  -  Skip n lines every time the  ;"xxx" -  Use xxx as the sub-header
            sort field value changes               caption, for no caption ;""
```

Example

```
========== Patient Representative Ad Hoc Report Generator ==========

     Contact Number                21    Date Sent
 2   Date Of Contact               22    Date Due
 3   Patient Name                  23    Issue C odes
 4   SSN                           24    Serv/Sect Involved (to 10/1/97)
 5   Date of Birth                 25    Serv/Discipline Involved
 6   Sex                           26    Disciplines
 7   Eligibility Status                  Is sue Text
 8   Category                      28    QM Involvement
 9   Info Taken by                       Resolution Comments
10   Entered by                    30    Date Resolved
     Name of Contact               31    Status
     Phone of Contact              32    Code Status
13   Contact Made by                     Code Definition
14   Source of Contact (to 10/1/97)  34  Refer to SEAT
15   Source(s) of Contact          35    Division
16   Location of Event             36    Level of Satisfaction
17   Treatment Status              37    Persian Gulf Service?
18   Employee                      38    Period of Service
19   Refer Contact to                    Issue Code Name
20   Congressional Contact

   Sort selection # 1: +17,'2
```

You can enter every sort field separated by commas at the first Sort selection. Here we chose to total and sort by the TREATMENT STATUS field and use the DATE OF CONTACT field for a range.

```
   Sort by: Treatment Status

    Sort from: BEGINNING// ?

   Enter the beginning sort value or press <RETURN> to start with BEGINNING.

    Select one of the following:

         I         Inpatient
         O         Outpatient
         D         Domiciliary
         N         NHCU
         L         Long Term Psych
         E         Extended/Intermed. Care
         H         HBHC

    Sort from: BEGINNING// <RET>
```

Example

```
  Sort by: Date Of Contact

    Sort from: BEGINNING// <RET>


  Save sort macro name: TREAT TOT
 Are you adding 'TREAT TOT' as a new AD HOC MACRO? No// Y    (YES)

  Ask user BEGINNING/ENDING values for Treatment Status? No// <RET>    (NO)

  Ask user BEGINNING/ENDING values for Date of Contact? No// Y    (YES)
```

Building the print macro.

```
=========== Patient Representative Ad Hoc Report Generator ===========

 1    Contact Number                 21    Date Sent
 2    Date Of Contact                22    Date Due
 3    Patient Name                   23    Issue Codes
 4    SSN                            24    Serv/Sect Involved (to 10/1/97)
 5    Date of Birth                  25    Serv/Discipline Involved
 6    Sex                            26    Disciplines
 7    Eligibility Status             27    Issue Text
 8    Category                       28    QM Involvement
 9    Info Taken by                  29    Resolution Comments
10    Entered by                     30    Date Resolved
11    Name of Contact                31    Status
12    Phone of Contact               32    Code Status
13    Contact Made by                33    Code Definition
14    Source of Contact (to 10/1/97) 34    Refer to SEAT
15    Source(s) of Contact           35    Division
16    Location of Event              36    Level of Satisfaction
17    Treatment Status               37    Persian Gulf Service?
18    Employee                       38    Period of Service
19    Refer Contact to               39    Issue Code Name
20    Congressional Contact

   Print selection # 1: [Save print macro

   The macro will be saved when you exit the print menu.
```

Example

```
=========== Patient Representative Ad Hoc Report Generator ===========

1   Contact Number                    21   Date Sent
 2   Date Of Contact                   22   Date Due
 3   Patient Name                      23   Issue Codes
 4   SSN                               24   Serv/Sect Involved (to 10/1/97)
 5   Date of Birth                     25   Serv/Discipline Involved
 6   Sex                               26   Disciplines
 7   Eligibility Status                27   Issue Text
 8   Category                          28   QM Involvement
 9   Info Taken by                     29   Resolution Comments
10   Entered by                        30   Date Resolved
11   Name of Contact                   31   Status
12   Phone of Contact                  32   Code Status
13   Contact Made by                   33   Code Definition
14   Source of Contact (to 10/1/97)    34   Refer to SEAT
15   Source(s) of Contact              35   Division
16   Location of Event                 36   Level of Satisfaction
17   Treatment Status                  37   Persian Gulf Service?
18   Employee                          38   Period of  Service
19   Refer Contact to                  39   Issue Code Name
20   Congressional Contact

     Print selection # 1: ??


Select the first data element to print.  Maximum of 7 print fields allowed.
Enter numeric 1 to 39, <RETURN> to end, ^ to exit.

Macro functions:        [L  Load print macro      [S  Save print macro
   [O  Output macro     [I  Inquire print macro   [D  Delete print macro

Print prefixes:   (e.g. enter !1 to turn on counting for field 1)
   &  Total                ! Count                      + Total, Count & Mean
   #  Total, Count, Mean, Maximum, Minimum, and Standard Deviation

Print suffixes:   (e.g. enter 1;C5 to print the field 1 value at column 5)
   ;Cn  -  Start output at column n     ;Yn    -  Start output at line n
           Use ;C-n to start output n             Use ;Y-n to start output n
           columns from the right margin          lines from the bottom margin
   ;Ln  -  Left justify data in an      ;Rn    -  Right justify data in an
           output field of n characters           output field of n characters
           Will truncate the output               Will not truncate the output
   ;Wn  -  Wrap output in a field of n  ;X     -  Omit spaces between print
           characters, breaks at word             fields and suppress the
           divisions, default wrap ;W             column header
   ;Sn  -  Skip n lines before printing ;Dn    -  Output numeric value with n
           Use ;S to skip one line                decimal places (ro unds off)
   ;N   -  Do not print duplicated data ;T     -  Use field Title as header
   ;""  -  Suppress column header       ;"xxx" -  Use xxx as column header
```

Example

```
=========== Patient Representative Ad Hoc Report Generator ===========

1   Contact Number                   21   Date Sent
 2   Date Of Contact                 22   Date Due
 3   Patient Name                    23   Issue Codes
 4   SSN                             24   Serv/Sect Involved ( to 10/1/97)
 5   Date of Birth                   25   Serv/Discipline Involved
 6   Sex                             26   Disciplines
 7   Eligibility Status              27   Issue Text
 8   Category                        28   QM Involvement
 9   Info Taken by                   29   Resolution Comments
10   Entered by                      30   Date Resolved
11   Name of Contact                 31   Status
12   Phone of Contact                32   Code Status
13   Contact Made by                 33   Code Definition
14   Source of Contact (to 10/1/97)  34   Refer to SEAT
15   Source(s) of Contact            35   Division
16   Location of Event               36   Level of Satisfaction
17   Treatment Status                37   Persian Gulf Service?
18   Employee                        38   Period of Service
19   Refer Contact to                39   Issue Code Name
20   Congressional Contact

   Print selection # 1: !17;C50    Treatment Status

   Print selection # 2: <RET>

   Save print macro name: TREAT TOT
  Are you adding 'TREAT TOT' as a new AD HOC MACRO? No// Y    (YES)

   Enter special report header, if desired (maximum of 60 characters).
   TREATMENT STATUS TOTALS

DEVICE: A100          RIGHT MARGIN: 80// <RET>
```

Reports Menu
Ad Hoc Report

Example

```
TREATMENT STATUS TOTALS                   FEB  9,1998  10:20    PAGE 1
                                          Treatment
                                          Status
-------------------------------------------------------------------

        TREATMENT STATUS: Inpatient
SUBCOUNT                                        8
        TREATMENT STATUS: NHCU
SUBCOUNT                                        3
        TREATMENT STATUS: Outpatient
SUBCOUNT                                        5
COUNT                                           16
```

Reports Menu
Contacts with No Patient Identified

Introduction

This option prints a list of contact records (by date range) that do not have a patient name associated with the contact. Information provided on the report includes date range, contact number and date of contact.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: MONTHLY

Enter Month and Year: 1/98   (JAN 1998)

Range selected: JAN 1,1998 to JAN 31,1998

DEVICE: <RET>  HOME    RIGHT MARGIN: 80// <RET>




Contacts with No Patient Identified              FEB  8,1998  09:21    PAGE 1
            Date Range Selected: JAN 01, 1998 to JAN 31, 1998
Contact          Date of
Number           Contact
-----------------------------------------------------------------------------

140.950007     JAN 12,1998
140.950008     JAN 12,1998
140.950013     JAN 24,1998
140.950016     JAN 25,1998
```

Reports Menu
Daily List of Patient Contacts

Introduction

This report prints a listing of all contacts for a selected date range. Information provided may include contact number, patient name and SSN, issue code, customer service standard, and service/section or discipline. Each date in the range will be printed on a separate page.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: USER SELECTABLE

Enter beginning and ending dates for the desired time period:

Beginning Date: 2/1/98    (FEB 01, 1998)
Ending Date: FEB 1,1998// T    (FEB 08, 1998)

Range selected: FEB 1,1998 to FEB 8,1998

DEVICE: <RET>   HOME       RIGHT MARGIN: 80// <RET>
```

Reports Menu
Daily List of Patient Contacts

Example

```
Daily Listing of Patient Contacts              FEB  8,1998  09:21    PAGE 1
            Date Range Selected: FEB 01, 1998 to FEB 08, 1998
   Contact #         Patient Name                      SSN
Issue Code                               (*Customer Service Standard)
    Serv/Sect or Discipline
-----------------------------------------------------------------------------
                           FEB  1,1995

  140.950020        ARBUCKEL,JON                           276492648
CC15   Appt date/time misunderstood, not communicated, or in
    LABORATORY/PATHOLOGY

  140.950021        ARBOGAST,JON                           123443223
T107   Delay/postponement in surgical procedure (*Timeliness)
    SURGICAL




Daily Listing of Patient Contacts              FEB  8,1998  09:21    PAGE 2
            Date Range Selected: FEB 01, 1998 to FEB 08, 1998
   Contact #         Patient Name                      SSN
Issue Code                               ( *Customer Service Standard)
    Serv/Sect or Discipline
-----------------------------------------------------------------------------
                           FEB  2,1995

  140.950022        BEARD,BLUE                             101020432
EL03   Dental care eligibility
    DENTAL
```

Reports Menu
List of Open Cases

Introduction

This report provides the date of contact, patient name, SSN, and contact number for all open cases for a selected date range.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: USER SELECTABLE

Enter beginning and ending dates for the desired time period:

Beginning Date: 2/1/98   (FEB 01, 1998)
Ending Date: FEB 1,1998// T   (FEB 08, 1998)

Range selected: FEB 1,1998 to FEB 8,1998

DEVICE: <RET>   HOME      RIGHT MARGIN: 80// <RET>




List of Open Cases                        FEB  9,1998  09:22    PAGE 1
            Date Range Selected: FEB 01, 1998 to FEB 08, 1998
Date of
Contact      Patient Name                 SSN         Contact #
------------------------------------------------------------------------

FEB  1,1998  ARBUCKEL,JON                 276492648   140.950020
FEB  1,1998  ARBOGAST,JON                 123443223   1 40.950021
FEB  1,1998  BEARD,BARRY                  101020432   140.950022
FEB  2,1998  BEARD,BARRY                  101020432   140.950023
FEB  2,1998  ARBOGAST,JON                 123443223   140.950024
FEB  7,1998  CAM,FELIX                    666770000   140.950027
FEB  7,1998  GIBSON,MICHAEL               284627548   140.950029
```

Reports Menu
Patient Name with Brief Data

Introduction

This option provides a brief summary of a selected patient's contacts for a selected date range. Information provided may include patient name and SSN, contact number, issue text, issue codes, service or discipline, and division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: QUARTERLY

Enter Quarter and Year: 2/98

Range selected: JAN 1,1998 to MAR 31,1998


Select PATIENT: FARCAS,SCOTT    08-23-48     475632643     YES     SC VETERAN

DEVICE: <RET>   HOME    RIGHT MARGIN: 80// <RET>
```

Reports Menu
Patient Name with Brief Data

Example


```
Patient Name with Brief Data                    APR  8,1998  09:23    PAGE 1
PATIENT NAME                      SSN            CONTACT #
ISSUE TEXT
ISSUE CODES
          SERVICE OR DISCIPLINE
                                      DIVISION
-----------------------------------------------------------------------------


FARCAS,SCOTT                      475632643    140.950005
Mrs. Farcas states she has made repeated calls to her husband's doctors and
no one has returned them.  She is deeply concerned about his diagnosis and
treatment.
CC06   Phone calls not returned
          ONCOLOGY




FARCAS,SCOTT                      475632643    140.950014
MR FARCAS CAME TO THE PATIENT REP CONCERNED ABOUT THE MEDICATIONS AND THE
TREATMENT.  HE IS CONCERNED THAT STAFF REALLY KNOW WHAT TO DO FOR HIM,
BECAUSE OF INDIFFERENT ATTITUDE WHEN HE ASKS QUESTIONS ABOUT HIS CONDITION
AND ABOUT THE MEDICATION THAT IS GIVEN.  HE IS ASKING IF THERE IS ANOTHER
TREATMENT TEAM THAT HE COULD BE ASSIGNED TO.
CA09   Lack of confidence and trust in caregiver
          NURSING
          MEDICINE
CA19   Dissatisfied with pain medication
          ONCOLOGY




FARCAS,SCOTT                      475632643    140.950026
Mr. Farcas would like to thank Mr. Task for coming to his aid when he had
difficulty getting his wheelchair over a curb during his last visit.  He
stated that Mr. Task went out of his way to then help him find the correct
clinic and asked that someone help him back to his car after his appointment.
Voluntary Service provided the help that was needed.

Mr. Farcas would also like to complain about the poor access from the south
lot to the Outpatient area.  He feels that access for wheelchairs is
inadequate particularly in the winter because snow is not  removed
sufficiently to get around.
CM01   Courtesy
EN06   Issues related to safety
          ENVIRONMENTAL MANAGEMENT
```

Reports Menu
Report by Employee

Introduction

This option prints a report by employee name that contains the contact record number, date of the contact, patient name, issue text, and service/discipline for a selected date range. The report for each selected employee will print on a separate page.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: USER SELECTABLE

Enter beginning and ending dates for the desired time period:

Beginning Date: 1 1 98   (JAN 01, 1998)
Ending Date:   JAN 1,1998// t   (FEB 03, 1998)

Range selected: JAN 1,1998 to FEB 3,1998

Select ALL Divisions? YES// <RET>

Enter an Employee Name or <CR> for ALL: <RET>

DEVICE: HOME// A100    Right Margin: 132// <RET>
```

Reports Menu
Report by Employee

Example

```
Report by Employee                          FEB  8,1998  09:23    PAGE 1
            Date Range Selected: JAN 01, 1998 to FEB 03, 1998
Contact #                 Date of Contact       Patient Name
   Issue Text
       Serv/Sect or Discipline
-----------------------------------------------------------------------
                        Division: BUFFALO
                     EMPLOYEE: CHANEY,LUCAS


140.950006              JAN 3,1998            GRIMM,BEN
   This patient is unhappy with the way Mr. Chaney made his return appts.
       MEDICAL




Report by Employee                          FEB  8,1998  09:23    PAG E 2
            Date Range Selected: JAN 01, 1998 to FEB 03, 1998
Contact #                 Date of Contact       Patient Name
   Issue Text
       Serv/Sect or Discipline
-----------------------------------------------------------------------
                        Division: BATAVIA
                     EMPLOYEE: CHANEY,LUCAS


140.950018              JAN 3,1998              TOWNSEND,RALPH
   Patient feels he was not notified in time of appt. cancellation.
       MEDICAL
```

Reports Menu
Report of Contact

Introduction

The Report of Contact option is used to generate a report of contact. It can be printed to the screen, sent to a printer, or sent to a specific person(s) via E-MAIL by entering *P-MESS* at the *DEVICE* prompt.

You have the option to include/not include the resolution text for the selected report of contact.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Enter the Contact you wish to generate: FARCAS,SCOTT    08-23-48    475632643
YES    NSC VETERAN
     1      140.950005        01-12-98      FARCAS,SCOTT
     2      140.950012        04-24-98      FARCAS,SCOTT
     3      140.950014        07-24-98      FARCAS,SCOTT
     4      140.950026        09-06-98      FARCAS,SCOTT
CHOOSE 1-4: 4  14000.950026

Do you want the Resolution Text included? NO// YES

DEVICE: HOME// <RET>      RIGHT MARGIN: 80// <RET>
```

Reports Menu
Report of Contact

Example

** This information is not for the Patient Record **

                              Report of Contact   Date: NOV 08, 1998

Contact Number: 140.950026   Date of Contact: SEP 06, 1998
Patient Name: FARCAS,SCOTT   Patient S SN: 475632643
Treatment Status: Outpatient   Location of Event:CLINIC 201
Name of Contact: Mr. Farcas   Phone of Contact: (123)456 -7890
Date Due: SEP 8,1998   Info taken by: DONAT,DONALD
Elig. Status: NSC   Source of Contact: Visit

Refer To: JONES,HARVEY
                   WILLIAMSON,CATHY

Issue Text:
  Mr. Farcas would like to thank Mr. Task for coming to his aid when he
  had difficulty getting his wheelchair over a curb during his last
  visit. He stated that Mr. Task went out of his way to then help him
  find the correct clinic and asked that someone help him back to his car
  after his appointment. Voluntary Service provided the help that was
  needed.

  Mr. Farcas would also like to complain about the poor access from the
  south lot to the Outpatient area. He feels that access for wheelchairs
  is inadequate particularly in the winter because snow is not removed
  sufficiently to get around.

Resolution:
   *** 9/8/98 8:51:03 am WILLIAMSON,CATHY ***

  I checked the area Mr. Farcas mentioned and agree that the area is
  inadequate for any wheelchair bound or other person who has difficulty
  getting around. I put flags up surrounding access areas that should be
  thoroughly cleaned during snow clearance. These will remain up all
  winter. I also spoke with Voluntary Service about the problem and they
  have offered to place a person in the area during bad weather to aid
  any person needing help. This action is really only short term. We
  should consider removing curbs from this area altogether.

  Thank you for bringing this to my attention.

  *** End of response ***

  This topic has been added to the agenda for the next meeting of the
  Safety Committee. For now we will consider this closed.

Example

We have closed the ROC on Mr. Farcas but want Mr. Jones to see the final outcome of the ROC with the resolution. The next time Mr. Jones goes into MailMan, he will receive a New Message and the ROC data will be in that message. Using MailMan also allows you to send ROCs as "Priority" or "Confirmation requested" messages.

```
Enter the Contact you wish to generate: 14000.950026
Do you want the Resolution Text included? NO// YES

DEVICE: HOME// P-MESS   P-MESSAGE-HFS  DISK

Moving text to MailMan message... (Creating now)
Subject: Closed ROC Mr. Farcas....
END OF FILE

Send mail to: WILLIS,CAROL// <RET>
  Select basket to send to: IN// <RET>
And send to: JONES,HARVEY
And send to: <RET>
Message subject: Closed ROC Mr. Farcas, Message number: 22800

Enter the Contact you wish to generate:
```

Reports Menu
Statistical Reports Menu
Discipline Contact Totals

Introduction

This option prints the total contacts for each discipline for a date of contact date range. It includes the contact date, patient name and SSN, contact number, and issue text. A subcount of each selected discipline is provided along with the total count of all disciplines.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: USER SELECTABLE

Enter beginning and ending dates for the desired time per iod:

Beginning Date: 1 1 98    (JAN 01, 1998)
Ending Date: JAN 1,1998// t    (FEB 03, 1998)

Range selected: JAN 1,1998 to FEB 3,1998

Select ALL Divisions? YES// NO
Enter division: BUFFALO// <RET>
    START WITH DISCIPLINE: FIRST// <RET>
DEVICE: HOME// A100    Right Margin: 132// <RET>
```

Reports Menu
Statistical Reports Menu
Discipline Contact Totals

Example


```
Discipline Contact Totals                FEB  9,1998  11:08          PAGE 1
                  Date Range Selected: JAN 01, 1998 to FEB 03, 1998
Contact
Date          Patient            SSN           Contact #
   Issue Text
--------------------------------------------------------------------------------

                        DIVISION: BUFFALO

               DISCIPLINE: MEDICINE

JAN  1,1998   DELONG,ALEX        444444444          140.950001
  Mr. Delong stated that while he was being examined no curtains were
  drawn around his bed.

JAN 20,1998   BURR,RAYMOND       345773542          140.950011

JAN 24,1998   FARCAS,SCOTT       475632643          140.9 50014
                                                    ------------
SUBCOUNT                                            3


               DISCIPLINE: LABORATORY/PATHOLOGY

JAN 10,1998   BARLEY,JOY         109887899          140.950003

JAN 14,1998   PARKER,MARK        087123434          140.950010
                                                    ------------
SUBCOUNT                                            2

                                                    ------------
COUNT                                               5
```

Reports Menu
Statistical Reports Menu
Discipline Issue Totals

Introduction

This report provides totals of all issues for one or all discipline(s) over a selected date range. If the report is printed for all disciplines, each discipline will print on a separate page.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable

Select date range: YEARLY

Enter YEAR: 98

Range selected: JAN 1,1998 to DEC 31,1998

Would you like this report for one Discipline only? NO// Y   YES

Select CONTACT DISCIPLINES CODE: MD   MEDICAL

DEVICE: HOME// <RET>    RIGHT MARGIN: 80// <RET>




Discipline Issue Report for MEDICAL                       Date: DEC 22, 1998
YEAR 1998                                                 Page: 1
------------------------------------------------------------------------------
           Total Issues for MEDICAL = 3

    CA    PATIENT CARE                                                      1
CA05  Dissatisfied with Referral Outcome(*Coordination of Care)            1


    CM    COMPLIMENTS                                                       1
CM01  Courtesy                                                             1

    EN    ENVIRONMENT                                                       1
EN06  Issues related to safety                                             1
```

Reports Menu
Statistical Reports Menu
Service/Discipline Contact Totals

Introduction

This report totals contacts by service/discipline for a date of contact date range. Information provided on the report includes contact date, patient name and SSN, contact number, and issue text. A subcount of contacts for each selected service/discipline is provided along with the total count of all service/disciplines.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: YEARLY

Enter YEAR: 98

Range selected: JAN 1,1998 to DEC 31,1998

Select ALL Divisions? YES// NO
Enter Division: BUFFALO// <RET>
  START WITH SERVICE/DISCIPLINE: FIRST// <RET>
DEVICE: HOME// <RET>    RIGHT MARGIN: 80// <RET>
```

Reports Menu
Statistical Reports Menu
Service/Discipline Contact Totals

Example

```
Service/Discipline Contact Totals                FEB  9,1998  11:08       PAGE 1
                 Date Range Selected: JAN 1,1998 to DEC 31,1998
Contact
Date          Patient              SSN             Contact #
  Issue Text
-------------------------------------------------------------------------------

                          DIVISION: BUFFALO
                     SERVICE/DISCIPLINE: MEDICINE

JAN  1,1998   DELONG,ALEX          444444444       140.950001
  Mr. Delong stated that while he was being examine d no curtains were drawn around
  his bed.

JAN 20,1998   BURR,RAYMOND         345773542       140.950011

JAN 24,1998   FARCAS,SCOTT         475632643       140.950014
                                                   ------------
SUBCOUNT                                           3


                     SERVICE/DISCIPLINE: LABORATORY/PATHOLOGY

JAN 10,1998   BARLEY,JOY           109887899       140.950003

JAN 14,1998   PARKER,MARK          087123434       140.950010
                                                   ------------
SUBCOUNT                                           2
                                                   ------------
COUNT                                              5
```

Reports Menu
Statistical Reports Menu
Service/Discipline Issue Totals

Introduction

This report provides totals of all issues for one or all service/discipline(s) over a selected date range. If the report is printed for all service/disciplines, each service/discipline will print on a separate page.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable

Select date range: YEARLY

Enter YEAR: 98

Range selected: JAN 1,1998 to DEC 31,1998

Would you like this report for one Service/Discipline only? NO// Y   YES
Select QAC SERVICE/DISCIPLINE NAME: MD   MEDICAL           MD

DEVICE: dev2   DEV2$PRT-A138-16/6/UP LM 12  Hall by A413




Service/Discipline Issue Report for MEDICAL            FEB  9,1998  11:08
YEAR 1998                                              PAGE 1
-------------------------------------------------------------------------


                Total Issues for MEDICAL = 3

    CA   PATIENT CARE                                                   1
CA05  Dissatisfied with Referral Outcome (*Coordination of Care)        1

    CM   COMPLIMENTS                                                    1
CM01  Courtesy

    EN ENVIRONMENT                                                     1
EN06  Issues related to safety                                          1
```

Reports Menu
Statistical Reports Menu
Customer Service Standards Reports

Introduction

This report lists the number of Report of Contacts logged with each Customer Service Standard for a selected date range.

You may choose to print the report for one discipline or one service/discipline. If you choose to print by discipline, the discipline must be entered in uppercase as a valid two letter abbreviation. If you choose service/discipline, the entry must be from the SERVICE/DISCIPLINE file (#745.55).

The disciplines are a set group of values that are exported with the Patient Representative software. The service/disciplines are entries from the SERVICE/DISCIPLINE file and must be linked to one of the established disciplines. New entries may be made to this file through the Add New Service/Discipline option in the Set-up and Maintenance Menu.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable

Select date range: YEARLY

Enter YEAR: 98

Range selected: JAN 1,1998 to DEC 31,1998

Do you want to print this report for just one Discipline? No// Y    YES
Enter the Discipline as a two letter abbreviation: MD

DEVICE: HOME// <RET>    RIGHT MARGIN: 80// <RET>
```

Reports Menu
Statistical Reports Menu
Customer Service Standards Reports

Example

```
Customer Service Standards Reports                    Date: JAN 04, 1999
Report for Discipline - MEDICAL
YEAR 1998

                                        NUMBER OF
            CUSTOMER SERVICE STANDARD    OCCURRENCES
------------------------------------------------------------------------
            Staff Courtesy                  0
            Timeliness                      0
            One Provider                    2
            Decisions                       0
            Emotional Needs                 0
            Coordination of Care            1
            Patient Education               0
            Family Involvement              1
            Physical Comfort                0
            Transitions                     1
                                         -------
                            TOTAL            5
```

Reports Menu
Statistical Reports Menu
Employee Contact Totals

Introduction

This report totals employee contacts by employee and service/discipline for a date of contact date range. Information provided on the report includes contact date and patient name. A subcount of contacts for each selected employee is provided along with the total count for all employees.

The date of contact date range, employee, and service/discipline selected the last time this option was utilized will be displayed before each appropriate prompt.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
* Previous selection: DATE OF CONTACT not null
START WITH DATE OF CONTACT: FIRST//  <RET>
  * Previous selection: EMPLOYEE not null
  START WITH EMPLOYEE: FIRST//  <RET>
    * Previous selection: SERVICE/DISCIPLINE not null
    START WITH SERVICE/DISCIPLINE: FIRST//  <RET>

DEVICE: DEV2
 1 DEV2$PRT-A138-16/6/UP   Development HP5 Si
 2 DEV2$PRT-A138-16/6/UP LM 12   Hall by A413
Choose 1-2> 2   DEV2$PRT-A138-16/6/UP LM 12  Hall by A413


Press RETURN to continue... <RET>
```

Reports Menu
Statistical Reports Menu
Employee Contact Totals

Example

```
Employee Contact Totals                          FEB  8,1995  09:26    PAGE 1
                                        Contact
 Patient                                Date
-----------------------------------------------------------------------------

          EMPLOYEE: CHANEY,LUCAS
             SERVICE/DISCIPLINE: MEDICAL
 GRIMM,BEN                               JAN 12,1995
 GRIMM,BEN                               JAN 12,1995
 CAM,FELIX                               JAN 12,1995
                                        -----------
SUBCOUNT                                3


          EMPLOYEE: JONES,HARVEY
               SERVICE/DISCIPLINE: MEDICAL
 FARCAS,SCOTT                            JAN 24,1995
                                        -----------
SUBCOUNT                                1


          EMPLOYEE: REESE,RHONDA
             SERVICE/DISCIPLINE: MEDICAL
 GRIMM,BEN                               JAN 12,1995
               SERVICE/DISCIPLINE: LABORATORY
 BUSTER,BILLY                            JAN 18,1995
                                        -----------
SUBCOUNT                                2
                                        -----------
COUNT                                   6
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Introduction

This option prints the total number of issues for a date range. You may choose to print issues for all records or only those for male or female patients. All issue codes will be displayed on the report, even those with a zero total.

It should be noted that a report for "All" issues includes issue counts for records with no patient.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: YEARLY

Enter YEAR: 98

Range selected: JAN 1,1998 to DEC 31,1998


     Select one of the following:


          A         All
          M         Male
          F         Female


     Selection: ALL

DEVICE: HOME//  <RET>      RIGHT MARGIN: 80//  <RET>
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Example

```
Issue Report for All                        Date: JAN 04, 1999
YEAR 1998                                    Page: 1
------------------------------------------------------------------------

               Total Issues for All = 15

      A    NEEDED                                               1
A01  Compliment                                                 0
A02  Patient education about medications                       0
A03  Implementation of procedures                              0
A04  Emotional needs not met                                   0
A05  Patient education on diag/care/prevention                 0
A06  Inadequate info given to patient/family                   1
A07  Record not available for appt                             0
A08  Request for evaluation for admission                      0
A09  Phone calls not returned                                  0
A10  Dental care eligibility                                   0
A11  Clinic treatment & follow-up eligibility                  0
A12  Prosthetics eligibility                                   0
A13  Med/Psych problem not addressed                           0
A14  Disagree with tx plan                                     0
A99  Other                                                     0
A   NEEDED                                                     0


      B    COMPETENT                                            4
B01  Compliment                                                0
B02  Missing medical records                                   0
B03  Record not available for appointment                      4
B04  Implementation of medications                             0
B05  Implementation of procedures                              0
B06  Dissatisfaction with the meds recommended                 0
B99  Other                                                     0
B   COMPETENT                                                  0


      CA    PATIENT CARE                                        4
CA01  Request for admission denied(*Decisions)                 0
CA02  Disagree with treatment plan                             2
CA03  Patient not Included/Disagree with Decisions about(*Decisions)   0
CA04  Implementation of procedures(*Coordination of Care)      0
CA05  Dissatisfied with Referral Outcome(*Coordination of Care)   0
CA06  Patient perceives care as not being coordinated(*Coordination of Care)  0
CA07  Medical/Psychiatric problem not addressed(*Coordination of Care)   0
CA08  Emotional needs not met(*Emotional Needs)                0
CA09  Lack of confidence and trust in caregiver(*Decisions)    0
CA10  Patient feels 'rushed' by staff                          2
CA11  Patient/family not involved in patient's care(*Family Involvement)   0
CA12  Dissatisfied with ward assignment                        0
CA13  Lack of privacy(*Emotional Needs)                        0
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Example

```
Issue Report for All                                  Date: DEC 31, 1998
YEAR 1998                                             Page: 2
------------------------------------------------------------------------

CA14  Quality of care related to hygiene(*Physical Comfort)          0
CA15  Concerns related to diet/feeding(*Physical Comfort)            0
CA16  Concerns related to therapy/ambulatio n needs(*Physical Comfort)  0
CA17  Pain medication not ordered(*Physical Comfort)                 0
CA18  Other medication not ordered(*Coordination of Care)            0
CA19  Dissatisfied with pain medication(*Physical Comfort)           0
CA201  TEST ONE                                                      0
CA202  TST 2                                                         0
CA20  Dissatisfied with other medication(*Coordination of Care)      0
CA21  Medication error(*One Provider)                                0
CA22  Dissatisfied with alternative pain management(*Physical Comfort)  0
CA23  Disagree with discharge plan                                   0
CA24  Follow-up care not delivered(*Transitions)                     0
CA25  Dissatisfied with outplacement(*Decisions)                     0
CA26  Allegations of negligence/malpractice                          0
CA27  Allegations of abuse                                           0
CA28  Patient perceives inadequate care due to VA cost c             0
CA29  Requests Non-Formulary or Private Physician Ordere             0
CA   PATIENT CARE                                                    0


     CC   COURTESY / COMMUNICATION                                   2
CC01  Perceived rude behavior                                        0
CC02  Not treated with dignity and respect/Perceived rud(*Staff Courtesy)  0
CC03  Non-caring attitude of staff(*Staff Courtesy)                  0
CC04  Staff talk as though patient not present(*Staff Courtesy)      0
CC05  Staff not listen to patient concerns/Patient feels(*Staff Courtesy)  0
CC06  Phone calls not returned/answered(*Staff Courtesy)             0
CC07  Perceived retaliation for expressing concerns(*Staff Courtesy)  0
CC08  Lack of availability of staff to discuss concerns              0
CC09  Insufficient communication wi th doctor                        0
CC10  Insufficient information given to patient/family               1
CC11  Inconsistency in information given to patient/fami(*One Provider)  0
CC12  Patient does not know who his/her doctor is(*One Provider)      0
CC13  Clinical terminology used is difficult to understa             1
CC14  Practitioner's English is difficult to understand              0
CC15  Appt date/time misunderstood, not communicated, or             0
CC   COURTESY / COMMUNICATION                                        0


     CM   COMPLIMENTS                                                4
CM01  Courtesy                                                       2
CM02  Timeliness                                                     0
CM03  Treatment                                                      0
CM04  Competent                                                      0
CM05  Caring                                                         0
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Example

```
Issue Report for All                              Date: DEC 31, 1998
YEAR 1998                                         Page: 3
------------------------------------------------------------------------------

CM06  Improved service, i.e., primary care                          2
CM07  Consolidation of appointments                                 0
CM201  NEW CODE                                                     0
CM  COMPLIMENTS                                                     0


    C    CARING                                                    0
C01  Complimentary letters/comments                               0
C02  Perceived rude behavior                                      0
C03  Lack of privacy                                              0
C04  Lost personal effects                                         0
C05  Damaged personal property                                    0
C06  Phone calls not returned                                     0
C07  Not listening to patient concerns                             0
C08  Difficulty finding parking                                   0
C09  Difficulty obtaining copies of medical record                0
C10  No interaction between staff & pt/family                       0
C13  Family not updated on pt. location/condition                 0
C14  Emotional needs not met                                      0
C15  Long wait pain/other medication                              0
C16  Implementation of procedures                                 0
C17  Quality of care related to hygiene                           0
C19  Follow-up care was not delivered                             0
C20  Implementation of medications                                0
C21  Inadequate info given to patient/family                      0
C22  Dissatisfied with medication recommended                     0
C23  Dissatisfied with out placement                               0
C99  Other                                                        0
C  CARING                                                          0


    D    COST EFFECTIVE                                            0
D01  Lost personal effects                                        0
D02  Damaged personal property                                    0
D03  Lost/missing money                                            0
D04  Dissatisfied with referral                                   0
D05  Dissatisfied with out placement                              0
D06  Appt date/time misunderstood                                 0
D07  Dental care eligibility                                      0
D08  Clinic treatment & follow-up eligibility                      0
D09  Travel eligibility                                           0
D10  Prosthetics eligibility                                       0
D11  Eligibility for hospital admission/stay                      0
D12  Eligibility for ambulance/private hosp payment               0
D13  Pharmacy co-payment                                           0
D14  VA billing for services                                      0
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Example

```
Issue Report for All                              Date : DEC 31, 1998
YEAR 1998                                         Page: 4
-----------------------------------------------------------------------

D15  Compliment                                                    0
D99  Other                                                         0
D   COST EFFECTIVE                                                 0


     ED    PATIENT EDUCATION                                       0
ED01  Diagnosis / care / prevention(*Patient Education)            0
ED02  Purpose/side effects of medication(*Patient Education)       0
ED03  Patient rights                                               0
ED04  After care info, ie. who to call, activities , dang(*Patient Education) 0
ED05  Nutrition Information(*Patient Education)                    0
ED   PATIENT EDUCATION                                             0


     EL    ELIGIBILITY / POLICY                                    0
EL01  Clinic treatment and follow-up eligibility                  0
EL02  Hosp, extended care, or nursing home eligibility            0
EL03  Dental care eligibility                                     0
EL04  Prosthetics eligibility                                     0
EL05  Travel eligibility                                          0
EL06  Ambulance/private hospital payment eligibility              0
EL07  VA billing for service/Pharmacy co-payment                  0
EL08  Pharmacy co-payment                                         0
EL09  Problem getting personal monies                             0
EL10  Completing of forms/letters                                 0
EL11  Medical center regulations                                  0
EL12  Smoking policy                                              0
EL   ELIGIBILITY / POLICY                                         0


     EN    ENVIRONMENT                                             0
EN01  Difficulty finding parking(*Physical Comfort)               0
EN02  Cleanliness(*Physical Comfort)                              0
EN03  Uncomfortable temperature in patient/visitor area(*Physical Comfort)  0
EN04  Insufficient supply of linens/pajamas(*Physical Comfort)    0
EN05  Complaints about Canteen cafeteria/store/vending a           0
EN06  Issues related to safety                                    0
EN   ENVIRONMENT                                                  0


     E    TIMELY                                                   0
E01  Delay receiving eyeglasses                                   0
E02  Delay receiving hearing aid                                  0
E03  Delay receiving prosthetic limbs, dentures                   0
E04  Delay receiving equip, wheelchair, bed                       0
E05  Delay in surgical procedure                                  0
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Example

```
Issue Report for All                             Date: DEC 31, 1998
YEAR 1998                                        Page: 5
-----------------------------------------------------------------------------

E06  Delay in referrals                                             0
E07  Delay getting meds as OP or at discharge                       0
E08  Long wait for pain/other medication                           0
E09  Excessive wait in Pharmacy                                     0
E10  Excessive wait for pharmacy mailing                           0
E11  Excessive wait for scheduled appt                             0
E12  Excessive wait for hosp admission                             0
E13  Excessive wait for rescheduled appt                           0
E14  Problem getting personal money                                0
E15  Delay in receiving test results                               0
E16  Compliment                                                     0
E99  Other                                                          0
E   TIMELY                                                          0


     F    MINIMIZES RISK                                            0
F01  Disagree with discharge plan                                  0
F02  Upset with admission to locked ward                           0
F03  Request for evaluation for admission                          0
F04  Missing medical records                                       0
F05  Record not avail. for appt                                    0
F06  No interaction staff with patient/family                      0
F07  Inadequate info given to patient/family                       0
F08  Not listening to patient concerns                             0
F09  Cleanliness of room, ward, hosp                               0
F10  Hospital/ward regulations                                     0
F11  Disagree with info entered in record                          0
F12  Disagree with smoking policy                                  0
F13  Compliment                                                     0
F99  Other                                                         0
F   MINIMIZES RISK                                                 0


     G    ACHIEVES ACHIEVABLE BENEFITS                              0
G01  Disagree with treatment plan                                  0
G02  Disagree with discharge plan                                  0
G03  Request for medications                                       0
G04  Med/Psych problem not addressed                               0
G05  Concerns related to diet/feeding                              0
G06  Concerns with therapy ambulation needs                        0
G07  Dissatisfied with ward assignment                             0
G08  Obtaining meds as OP or at discharge                          0
G09  Disagree with info entered in record                          0
G10  Difficulty obtaining medical record                           0
G11  Appt date/time misunderstood                                  0
G12  Disagree with smoking policy                                  0
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Example

```
Issue Report for All                                    Date: DEC 31, 1998
YEAR 1998                                                Page: 6
-----------------------------------------------------------------------------

G13  Compensation, fee basis, pension info                          0
G14  Compliment                                                     0
G99  Other                                                          0
G    ACHIEVES ACHIEVABLE BENEFITS                                   0


     IN    REQUEST FOR INFORMATION / ASSISTANCE                     0
IN01  Application for care                                          0
IN02  Eligibility for medical benefits                              0
IN03  VA billing for service                                        0
IN04  Receiving personal monies                                     0
IN05  Advance directives                                            0
IN06  Referral issues (internal/community)                          0
IN07  Medical center regulations                                    0
IN08  Obtaining copies of medical records/completion of             0
IN09  VARO related questions re: compensation, pension,             0
IN10  Legal issues                                                  0
IN11  Patient Rights/Responsibilities                               0
IN   REQUEST FOR INFORMATION / ASSISTANCE                           0


     MR    MEDICAL RECORDS                                          0
MR01  Medical record not available for appt                         0
MR02  Missing medical records                                       0
MR03  Disagree with data entered in record                          0
MR04  Confidentiality of information compromised                    0
MR05  Refusal to enter restrictions for patient in recor            0
MR06  Excessive wait for copies of medical records(*Timeliness)     0
MR07  Completing forms/letters                                      0
MR   MEDICAL RECORDS                                                0


     PP    PERSONAL PROPERTY                                        0
PP01  Lost/missing personal property                                0
PP02  Damaged personal property                                     0
PP03  Lost/missing money                                            0
PP   PERSONAL PROPERTY                                              0


     TI    TIMELINESS                                               0
TI01  Excessive wait at facility for scheduled appointme(*Timelin ess)  0
TI02  Excessive wait at facility for unscheduled appt(*Timeliness)  0
TI03  Excessive wait at facility for admission(*Timeliness)         0
TI04  Excessive delay scheduling or rescheduling appt w/(*Timeliness)  0
TI05  Delay in Scheduling Appt Outside Medical Center(*Timeliness)  0
TI06  Excess. wait for next avail. appt (not referral/re            0
```

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

Example

```
Issue Report for All                             Date: DEC 31, 1998
YEAR 1998                                         Page: 7
-----------------------------------------------------------------------

TI07  Delay/postponement in surgical procedure(*Timeliness)          0
TI08  Delay in performing scheduled tests/procedures(*Timeliness)    0
TI09  Delay in receiving test results(*Timeliness)                   0
TI10  Excess. wait for nursing response to call bell(*Timeliness)    0
TI11  Excess. wait for assistance, ie. bathing, eating, (*Timeliness) 0
TI12  Delay getting pain medications(*Timeliness)                    0
TI13  Delay getting other medications(*Timeliness)                   0
TI14  Excessive wait for pharmacy mailings(*Timeliness)              0
TI15  Excessive wait for discharge process(*Timeliness)              0
TI16  Delay receiving eyeglasses                                     0
TI17  Delay receiving hearing aid                                    0
TI18  Delay receiving prosthetic items(*Timeliness)                  0
TI19  Excessive wait for copies of medical records                  0
TI   TIMELINESS                                                      0
```

Reports Menu
Statistical Reports Menu
Location Issue Totals

Introduction

This option prints the total number of issues for a date range sorted by hospital location. Each location will print on a separate page.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: YEARLY

Enter YEAR: 98

Range selected: JAN 1,1998 to DEC 31,1998

Select ALL Divisions? YES// <RET>    YES

DEVICE: HOME// <RET>      RIGHT MARGIN: 80// <RET>




Issue Totals by Location                    JAN 04, 1999  09:33     PAGE 1
              Date Range selected: JAN 1, 1998 to DEC 31,1998
Issue Code                    Issue Code Name                        Total
---------------------------------------------------------------------------

              Total Issues for Division: BUFFALO   2
          Total Issues for Location:  11D MEDICINE    1
     CA    PATIENT CARE                                                   1
CA01  Request for admission denied                                       1
```

Reports Menu
Statistical Reports Menu
Location Issue Totals

Example

```
Issue Totals by Location                   JAN 04, 1999  09:33     PAGE 2
            Date Range selected: JAN 1, 1998 to DEC 31,1998
Issue Code                    Issue Code Name                        Total
-----------------------------------------------------------------------------

            Total Issues for Division: BUFFALO   2
          Total Issues for Location:  10C NEUROLOGY   1
    CC   COURTESY/COMMUNICATION                                          1
CC09  Insufficient communication with doctor                            1




Issue Totals by Location                   JAN 04, 1999  09:33     PAGE 3
            Date Range selected: JAN 1, 1998 to DEC 31,1998
Issue Code                    Issue Code Name                        Total
-----------------------------------------------------------------------------

            Total Issues for Division: BATAVIA   3
          Total Issues for Location:  11D MEDICINE   1
    CA   PATIENT CARE                                                    1
CA02  Disagree with treatment plan                                      1




Issue Totals by Location                   JAN 04, 1999  09:33     PAGE 4
            Date Range selected: JAN 1, 1998 to DEC 31,1998
Issue Code                    Issue Code Name                        Total
-----------------------------------------------------------------------------

            Total Issues for Division: BATAVIA   3
          Total Issues for Location:  8A SURGERY   2
    MR   MEDICAL RECORDS                                                 1
MR07  Completing forms/letters                                          1
    TI   TIMELINESS                                                      1
TI07  Delay/postponement in surgical procedure(*Timeliness)             1
```

Reports Menu
Statistical Reports Menu
Old Service/Section Contact Totals

Introduction

This option prints the total contacts for each selected service/section. Information includes the contact date, patient name, SSN, contact number, and issue text. A subcount of contacts for each selected service/section is provided along with the total count for all services/sections.

The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997. The old field was not deleted for historical purposes.

The date of contact date range and service/section selected the last time this option was utilized will be displayed before each appropriate prompt.

Example

```
* Previous selection: DATE OF CONTACT not null
START WITH DATE OF CONTACT: FIRST//  <RET>
  * Previous selection: SERV/SECT INVOLVED not null
  START WITH SERV/SECT INVOLVED: FIRST//  <RET>
DEVICE: <RET>    RIGHT MARGIN: 80//  <RET>
```

Reports Menu
Statistical Reports Menu
Old Service/Section Contact Totals

Example

```
Service/Section Contact Totals              DEC 24,1998  08:52    PAGE 1
Contact
Date           Patient
                              SSN          Contact #    Issue Text

-----------------------------------------------------------------------

               MEDICINE

JAN  1,1998   DELONG,ALEX        444444444    140.950001   Mr. Delong stated
                                                            that while he was
                                                            being examined
                                                            no curtains were
                                                            drawn around his
                                                            bed.

JAN 20,1998   BURR,RAYMOND       345773542    140.950011

JAN 24,1998   FARCAS,SCOTT       475632643    140.950014
                                              ------------
SUBCOUNT                                      3


               LABORATORY/PATHOLOGY

JAN 10,1998   BARLEY,JOY         109887899    140.950003

JAN 14,1998   PARKER,MARK        087123434    140.950010
                                              ------------
SUBCOUNT                                      2
                                              ------------
COUNT                                         5
```

Reports Menu
Statistical Reports Menu
Old Service/Section Issue Totals

Introduction

This option provides totals of all issues for each service over a selected date range. When actually printed, each service is printed on a separate page.

The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997. The old field was not deleted for historical purposes.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable

Select date range: YEARLY

Enter YEAR: 98

Range selected: JAN 1,1998 to DEC 31,1998

DEVICE: HOME// <RET>    RIGHT MARGIN: 80// <RET>




Issue Report for MEDICAL                            FEB  9,1998  11:08
YEAR 1998                                           PAGE 1
------------------------------------------------------------------------

             Total Issues for MEDICAL = 1

CA    PATIENT CARE                                                      1
      CA05  Dissatisfied with Referral Outcome (*Coordination of Care)  1


             Total Issues for DIETETICS = 1

EN    ENVIRONMENT                                                       1
      EN06  Issues related to safety                                    1


             Total Issues for NURSING = 1

CA    PATIENT CARE                                                      1
      CA09  Lack of confidence and trust in caregiver                   1
```

Reports Menu
Statistical Reports Menu
Spreadsheet Report

Introduction

The Spreadsheet Report option prints the data using a comma as a delimiter. Data can then be captured for loading into a word processor, saving the file as TEXT, and loading into a spreadsheet. There are no headers or footers on this report.

Note that some counts are by issue (#I) and some counts are by contacts (#C).

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
Select the date range you want to print.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range: USER SELECTABLE

Enter beginning and ending dates for the desired time period:

Beginning Date: 1/1/98   (JAN 01, 1998)
Ending Date: JAN 1,1998//T   (FEB 08, 1998)

Range selected: JAN 1,1998 to FEB 8,1998

Select ALL Divisions? YES// NO
Enter Division: TROY// <RET>

     1    Contact made by (#C)
     2    Issue Headers (#I)
     3    Issues
     4    Location (#I)
     5    Service (Old field - Service field deactivated 10/97 - #I)
     6    Service/Discipline (#I)
     7    Sex (*I)
     8    Contact Source (#C)
     9    Treatment Status (#C)
     10   Treatment Status (#I)
     11   Discipline (#I)
     12   Division (#C)
     13   Division (#I)

Print Spreadsheet Totals for: 2
```

Reports Menu
Statistical Reports Menu
Spreadsheet Report

Example

DEVICE: HOME// **<RET>**   RIGHT MARGIN: 80// **<RET>**

                  Issue Code Heading Spreadsheet Report
                     Date Range: JAN 01, 1998 to MAR 01, 1998

Division: TROY
Patient Care, 34
Courtesy/Communication, 19
Compliments, 2
Patient Education, 4
Eligibility, 2
Environment, 3
Information/Assistance, 2
Medical Records, 0
Personal Property, 0
Timeliness, 6

Set-up and Maintenance Menu
Add New Service/Discipline

Introduction

This option allows the user to add new entries into the SERVICE/DISCIPLINE file (#745.55) or to edit existing entries.

Disciplines are a set group of values that are exported with the Patient Representative software. The SERVICE/DISCIPLINE file allows entry of new values entered through this option. They must be linked to one of the established disciplines.

Example

```
Enter a new Service/Discipline: DIALYSIS
  Are you adding 'DIALYSIS' as a new QAC SERVICE/DISCIPLINE (the 13TH)? No//  Y
(Yes)
  QAC SERVICE/DISCIPLINE ABBREVIATION: DYL
NAME: DIALYSIS// <RET>
ABBREVIATION: DYL// <RET>
DISCIPLINE: MD   MEDICAL
COMMENT:
  No existing text
  Edit? NO// <RET>
```

Set-up and Maintenance Menu
Archive Report

Introduction

The Archive Report option prints archived Patient Representative contact records for a selected date range. Information provided includes the contact date, contact number, patient name, SSN, issue codes, issue text, and resolution comments.

No records are purged using this option.

Sites that have been integrated through the National Database Integration (NDBI) project and share one database will be prompted for division. You may select a single division or all divisions. If all is selected, the report will be sorted by division.

Example

```
     Using this option does not purge the records archived.
     At the device prompt, save the output to a file,
     capture the output for a word processing package,
     or send it to a printer for a hard copy report.

Select the date range to archive.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range:   YEARLY

Enter YEAR:   98

Range selected: JAN 1,1998 to DEC 31,1998

DEVICE: <RET>          RIGHT MARGIN: 80// <RET>
```

Set-up and Maintenance Menu
Archive Report

Example

```
Archived Patient Rep Contact Records
YEAR 1998


JAN  1,1998  140.950001  DELONG,ALEX                    444444444
Mr. Delong stated that while he was being examined, no curtains were drawn
around his bed, and the family of the next patient was sitting in the room
watching and hearing everything that was said.
    CA13    Lack of privacy
    CC01    Perceived rude behavior



JAN  3,1998  140.950002  CAMP,FELIX                     666770000



JAN  9,1998  140.950003  GORIN,HARRY                    387581000



JAN 12,1993  140.950004  HARTE,SHERRY                   309283948
This patient came to me to see if she could get travel money.  Her family is
unable to pick her up and she has been discharged today.
    EL05    Travel eligibility
She is eligible for travel monies and was given money for taxi  fare.



JAN 12,1998  140.950005  FARCAS,SCOTT                   475632643
Mrs. Farcas states she has made repeated calls to her husband' s doctors and
no one has returned them.  She is deeply concerned about his diagnosis and
treatment.
    CC06    Phone calls not returned
 ***  1/12/93 8:59:25 am  WILLIAMSON,CATHY  ***

I just spoke with her and apologized for our delay.  We have a meeting
planned for this afternoon with her and Mr. Farcas to discuss his care and
his concerns.  Thank you for bringing this to my attention.

***  End of response  ***
```

Set-up and Maintenance Menu
Congressional Contact Enter/Edit

Introduction

This option is used to enter or edit congressional offices/names into the CONGRESSIONAL OFFICE file (#745.4).

The CONGRESSIONAL CONTACT field appears when you enter a new or edit an old contact **and** when "CO" is entered in the CONTACT MADE BY field. This option allows you to build a list of choices for the CONGRESSIONAL CONTACT field. If you want to delete an item from that list of choices, inactivate it by entering YES at the *INACTIVE* prompt here.

If you are not interested in tracking congressional contacts for your records, it is not necessary to utilize this option.

Example

```
Enter office or name: ?
 ANSWER WITH CONGRESSIONAL OFFICE OFFICE/NAME
CHOOSE FROM:
   District 12
   District 14
   District 5
   Janet Hoff
   Joseph Smith

     You may enter a new CONGRESSIONAL OFFICE, if you wish
     In 3-60 characters, enter the office or person who made the
     congressional contact.
Enter office or name: District 10
  Are you adding 'District 10' as a new CONGRESSIONAL OFFICE (the 7TH)? No// y
(YES)
OFFICE/NAME: District 10// <RET>
INACTIVE: <RET>
```

Set-up and Maintenance Menu
Issue Code Enter/Edit

Introduction

This functionality is no longer available.

Example

```
Select Set-up and Maintenance Menu Option: ISsue Code Enter/Edit

     Issue Codes can no longer be entered or edited.
     Only National Issue Codes are valid.
     The Issue Code list will be periodically evaluated and updated.
```

Set-up and Maintenance Menu
Patient Representative Keys

Introduction

There are two keys that can be assigned to users in the Patient Representative package.

Patient Rep Info Taker Key

Users who hold this key comprise the list of choices at the *Information Taken By* prompt seen throughout this package. Generally, this includes the Patient Representative and/or any others whom your site chooses to take down information concerning a patient complaint. These individuals should be assigned this key.

Patient Rep Record Control

This key **must** be given to any user who requires the ability to see and/or edit any contact record.

The numbers preceding the keys shown in the example below will differ from site to site.

Example

```
Select the key you want to allocate/deallocate: ??

Choose from:
   142      QAC CONTACT      Patient Rep Info Taker Key
   153      QAC EDIT      Patient Rep Record Control

Select the key you want to allocate/deallocate: 153  QAC EDIT   Patient Rep
Record Control
       …OK? Yes// <RET>

Checking for current holders of the Patient Rep Record Control...
0 found.

Select PATIENT REPRESENTATIVE: ?

 Enter the name of a Patient Representative to add to the list.
 Enter a minus (-) Patient Representative name to remove a name from the  list.

Patient Reps. selected for key ALLOCATION:
   *** None ***

Patient Reps. selected for key DEALLOCATION:
   *** None ***
```

Set-up and Maintenance Menu
Patient Representative Keys

Example

```
Select PATIENT REPRESENTATIVE: PROVECH,MICHAEL

Select PATIENT REPRESENTATIVE: <RET>

Allocate/Deallocate Contact Representative key? NO// Y   (YES)

Allocating key:
   PROVECH,MICHAEL

Deallocating key:
   *** None ***
```

Set-up and Maintenance Menu
Purge Contact Records

Introduction

This option purges all contact records with dates of contact that fall within the selected date range. **These records cannot be retrieved once they are purged.**

Before running this option, you may wish to print a copy of the basic information in the records you want to purge by using the Archive Report option.

Example

```
                         ***WARNING***

     This option purges all Patient Rep contact records with Dates of Contact
     that fall within the date range you select.
     Once these records are purged, they cannot be recovered!

Are you sure you want to continue? NO// Y   (YES)

Select the date range to purge.

Monthly,  Quarterly,  Semi-Annually,  Yearly,  Fiscal Yearly,  User Selectable
Select date range:  YEARLY

Enter YEAR:  93

Range selected: JAN 1,1993 to DEC 31,1993

Should I continue with the purge? NO//  YES

Deletion request queued.
```

Set-up and Maintenance Menu
Site Parameters Edit

Introduction

This option is used to edit the site parameters associated with the Patient Representative package.

Display Issue Codes: YES//
This parameter determines whether or not the previously entered issue codes and services for a record should be displayed prior to the *Issue Codes* prompt. It is suggested that you answer YES to this parameter.

Automatic ROC Alert: NO//

1 or YES
You may entirely automate the sending of ROCs via the Alert System. With this method, any entry in the REFER CONTACT TO field will receive an alert containing information on the ROC. The recipients of these alerts can print a copy of the ROC, delete it, ignore it, or respond to it. Any response by the recipient of the alert is automatically dated and laid into the RESOLUTION COMMENTS field with the recipient's name. If this is the way you want to send ROCs, then set this parameter to 1 or YES. Any method using the Alert System sends a separate alert to each individual recipient.

0 or NO
If your site resolves many issues via the phone or if you often send ROCs to specific people just for their information and you do not want their names in the REFER CONTACT TO field, you may wish to leave this parameter set to 0 or NO. In this situation, you can use the Send or Kill an Alert option whenever you want to obtain a response that is automatically laid into the RESOLUTION COMMENTS field or whenever you just want to inform a person of a ROC.

If you want even more control, use the Report of Contact option using the device P-MESS. This sends the ROC via MailMan, and you can converse with the recipient until you feel the problem is resolved. This method does not automatically lay the recipient's comments into the RESOLUTION COMMENTS field.

See the Orientation section in this manual for an in-depth look at how Alerts work for the recipient of the ROC.

Set-up and Maintenance Menu
Site Parameters Edit

Example

```
Select QUALITY ASSURANCE SITE PARAMETERS NAME:  PHOENIX
DISPLAY ISSUE CODES?: YES//   <RET>
AUTOMATIC ROC ALERT: NO// NO
```

Glossary

Ad Hoc
A reporting mechanism that allows the user to determine, from a predefined list of fields, what fields the program should sort by and what data to print.

Alert
In the Patient Representative package, the alert contains the information in the Report of Contact.

Category
Category of Beneficiary as defined by the Patient Treatment File. Classification system for types of benefits.

Consumer Contact Number
A number designating a specific contact. The number consists of *site#*, *year*, and *case#*.
Example: 500.980017
500 = Albany CIOFO
98 = 1998
0017 = Case number

Contact
The person or organization that is getting in touch with the Patient Representative.

Eligibility
Classification system for entitlement.

Issue Code
Brief reason for the contact with the Patient Representative.

Macro
A series of commands that can be called up by one simple command. Used in the Ad Hoc Report option.

Patient Representative
An advocate or agent for the patient.

Patient (Contact) Representative Key
This key defines the look-up list for the INFORMATION TAKEN BY field.

Patient Rep Record Control Key	The authority allocated or given to Patient Representatives to be able to look at or edit any Patient Contact Record.
Report of Contact (ROC)	A printout of information concerning an issue.
Resolution Text	A word processing area in which information is entered on how an issue was managed.
Source of Contact	How contact with the Patient Representative was made.
Treatment Status	Where patient was at time of issue; inpatient, outpatient, etc.

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